DOCUMENT RESUME

ED 278 416 IR 051 777

AUTHOR Machovec, George S.
TITLE Administrative Issues in Planning a Library End User Searching Program. ERIC Digest.
INSTITUTION ERIC Clearinghouse on Information Resources, Syracuse, N.Y.
SPONS AGENCY Office of Educational Research and Improvement (ED), Washington, DC.
PUB DATE Dec 86
CONTRACT 400-85-0001
NOTE 3p.
AVAILABLE FROM ERIC Clearinghouse on Information Resources, Syracuse University, 030 Huntington Hall, Syracuse, NY 13244-2340 (free).
PUB TYPE Information Analyses - ERIC Information Analysis Products (071) -- Journal Articles (080) -- Viewpoints (120)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Budgeting; Computer Software; Evaluation; *Library Administration; *Library Automation; *Library Planning; Microcomputers; Needs Assessment; *Online Searching; Online Vendors; Policy; Position Papers; *Program Development; Publicity; Training; *Users (Information)
IDENTIFIERS ERIC Digests

ABSTRACT

This digest presents a reprint of an article which examines management principles that should be considered when implementing library end user searching programs. A brief discussion of specific implementation issues includes needs assessment, hardware, software, training, budgeting, what systems to offer, publicity and marketing, policies and procedures, and evaluation. It is concluded that end user searching represents an important step in allowing patrons to be self-sufficient in meeting their information needs and that libraries need to participate in this phase of the information-gathering process or face the possibility of a reduced role in the future. References are provided. (KM)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)
X This document has been reproduced as received from the person or organization originating it.
☐ Minor changes have been made to improve reproduction quality.
• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

ERIC
ERIC Clearinghouse
on Information Resources

Syracuse University • School of Education
Syracuse, New York 13244-2340
(315) 423-3640

ERIC DIGEST

ED278416

ADMINISTRATIVE ISSUES IN PLANNING A LIBRARY END USER SEARCHING PROGRAM

End user searching programs have become very popular in all types of libraries. In the 1970's, most of the end user experiments centered around teaching patrons how to use the same online systems as professional intermediaries without modification. However, most end users did not become regular online searchers for many reasons: search protocols can be difficult to learn and retain (systems are frequently changing), high online fees, and difficult access to search equipment. Many of these limitations are being reduced with microcomputer front-end software, intelligent gateways, widespread availability of microcomputers, and innovative pricing strategies by vendors and producers. The successful implementation of a library end user program requires careful planning from an administrative perspective to maximize effectiveness and keep costs reasonable.[1]

The literature reports on end user programs in virtually every type of setting such as academic, medical, public, and corporate libraries or information centers.[2,3,4,5] A review of the planning, funding, implementation, and evaluation of existing programs will assist managers in developing effective services without reinventing the wheel.

Objectives of an End User Program

End user programs can be developed in many different ways to accommodate varying needs. Some of the objectives which may be considered in establishing a new service would be: to increase awareness of users to online systems and specific databases; to provide training and consulting for patrons who wish to begin searching or to refine their skills; and to assist in maintaining an adequate level of current awareness of new developments in online searching.

Management Considerations

Charles B. Lowry suggests six management principles which will smooth implementation of any type of library automation: become informed (acquire a broad understanding of the technology to be implemented); discriminate (be realistic in what is to be accomplished); understand finances (budgeting for capital expenses, personnel, and ongoing costs must be considered); select knowledgeable personnel (people offering skills within or outside of an organization must be available); know your organization (cooperation and participation by staff is critical); and manage people wisely.[6]

Some of the specific issues which must be considered in an end user program are enumerated below.

- *Needs Assessment*. Some of the factors in this assessment should include trends in the field, offering awareness to users about what databases and systems are available, needs of the user population, and competing or complementary services in the organization.[7]
- *Hardware*. Most end user programs now in operation use microcomputers rather than dumb terminals. Micros offer such advantages as automatic log-on, the possibility of using front-end interfaces, and the greatest flexibility. Will the library offer its own equipment for this service or will patrons only be trained in the features of searching which must then be done on their own hardware in the office or home?
- *Software*. What type of communications software will be obtained for the end user program? Will a good general purpose communications software package be obtained or will a user-friendly front-end be purchased for use with a particular vendor or group of databases?[8]
- *Training*. A great deal of literature has been published describing end user training programs. Some of the issues include: will formal classes be offered (are they required before going online), what type of point-of-use documentation will be offered, will helpers be available while searches are being run, and will consultation be available for off-site searchers?[5,9,10,11,12]
- *Budgeting*. Will the equipment used for the end user program be dedicated for this purpose or will it be shared with hardware used for intermediary searching or other library applications? Will the connect time, communications, and printing charges be paid at all or in part by the patron? If the patron is paying for this service, who will set the rates, who will collect the money, how will the patron be terminated from the search if the allocation is used, and who will handle complaints for mistakes made by patrons which cost money but provide no useful results? Some of these questions can be answered by different types of services now available such as billing directly to the customer's credit card, prepaying for blocks of searches which can be conveniently billed to patrons, and other solutions (e.g., EasyNet does not charge for no-hits on a search).
- *What Systems to Offer*. Which online vendors will be offered in the end user program? Different vendors offer varying solutions for user friendly interfaces. DIALOG's Knowledge Index and BRS/After Dark provide low-cost user friendly evening searching; Wilsonline offers its user-friendly Wilsearch software as a microcomputer front-end; and gateways such as EasyNet offer a universal front-end for over 15 vendors which allows simple searching by answering questions.

IR051777

• *Publicity and Marketing.* Publicity is a key element in the success of any end user program. Who will be responsible for this function, how will it be funded, and what avenues will be used to reach primary clientele?

• *Policies and Procedures.* Clearly written guidelines for end user services will assist library staff in implementing the program and avoid patron frustration. Some issues to address would be: who may use the service, when is it available, are reservations necessary, how much does it cost, how is payment made, what type of assistance is available and will consulting be available later? Who will manage this program? In large institutions it can logically fall under the supervision of reference, library instruction, or even the systems librarian.

• *Evaluation.* How will the success of the program be measured? Will there be a systematic gathering of data by survey or questionnaire? How will criticisms be factored into improving the system?

Conclusion

End user searching is more than just a fad. It represents an important step in allowing patrons to be self-sufficient in meeting their information needs. Libraries need to participate in this phase of the information gathering process or face the possibility of a reduced role in the future.

References

[1]Des Chene, Dorice. "Online Searching by End Users." *RQ* 25 (1):89-95 (Fall 1985).

[2]Crooks, James E. "End User Searching at the University of Michigan." *Sixth National Online Meeting Proceedings*, 1985, pp. 99-110.

[3]Slingluff, Deborah; Yvonne Lev; Andrew Eisan. "An End User Search Service in an Academic Health Sciences Library." *Medical Reference Services Quarterly* 4(1):11-21 (Spring 1985).

[4]Kirk, Cheryl L. "End-User Training at the Amoco Research Center." *Special Libraries* 77(1):20-27 (Winter 1986).

[5]Branden, Shirley; Jeffrey M. Wehmeyer. "Do-It-Yourself Computer Searching: Launching an Educational Program for the End User Searching." *Medical Reference Services Quarterly* 4(2):11-14 (Summer 1985).

[6]Lowry, Charles B. "Technology in Libraries: Six Rules for Management." *Library Hi Tech* 3(3):27-29 (1985).

[7]Borgman, Christine L.; Donald O. Case; Dorothy Ingebretsen. "University Faculty Use of Computerized Databases: An Assessment of Needs and Resources." *Online Review* 9(4):307-323 (1985).

[8]Machovec, George. "Microcomputer Front-end Software for Bibliographic Information Systems." *Online Libraries and Microcomputers* 3(4):1-3 (April 1985).

[9]Hubbard, Abigail; Barbara Wilson. "An Integrated Information Management Education Program: Defining a New Role for Librarians in Helping End-Users." *Online* 10(2):15-23 (March 1986).

[10]Shelton, Anita L.; Davida Scharf. "Online Database Documentation for End User Training." *Sixth National Online Meeting Proceedings*, 1985, pp. 415-419.

[11]Friend, Linda. "Identifying and Informing the Potential End-User: Online Information Seminars." *Online* 10(1):47-56 (January 1986).

[12]Friend, Linda. "Independence at the Terminal: Training Student End Users to Do Online Literature Searching." *Journal of Academic Librarianship* 11(2):136-141 (1985).

Prepared by George S. Machovec, this digest originally appeared in *Online Libraries and Microcomputers* 4(6-7):1-4 (June 1986). It has been reprinted as an ERIC Digest with the permission of the author. December 1986.

OERI Office of Educational Research and Improvement U.S. Department of Education

This publication was prepared with funding from the Office of Educational Research and Improvement, U.S. Department of Education, under contract no. 400-85-0001. The opinions expressed in this report do not necessarily reflect the positions or policies of OERI or ED.